

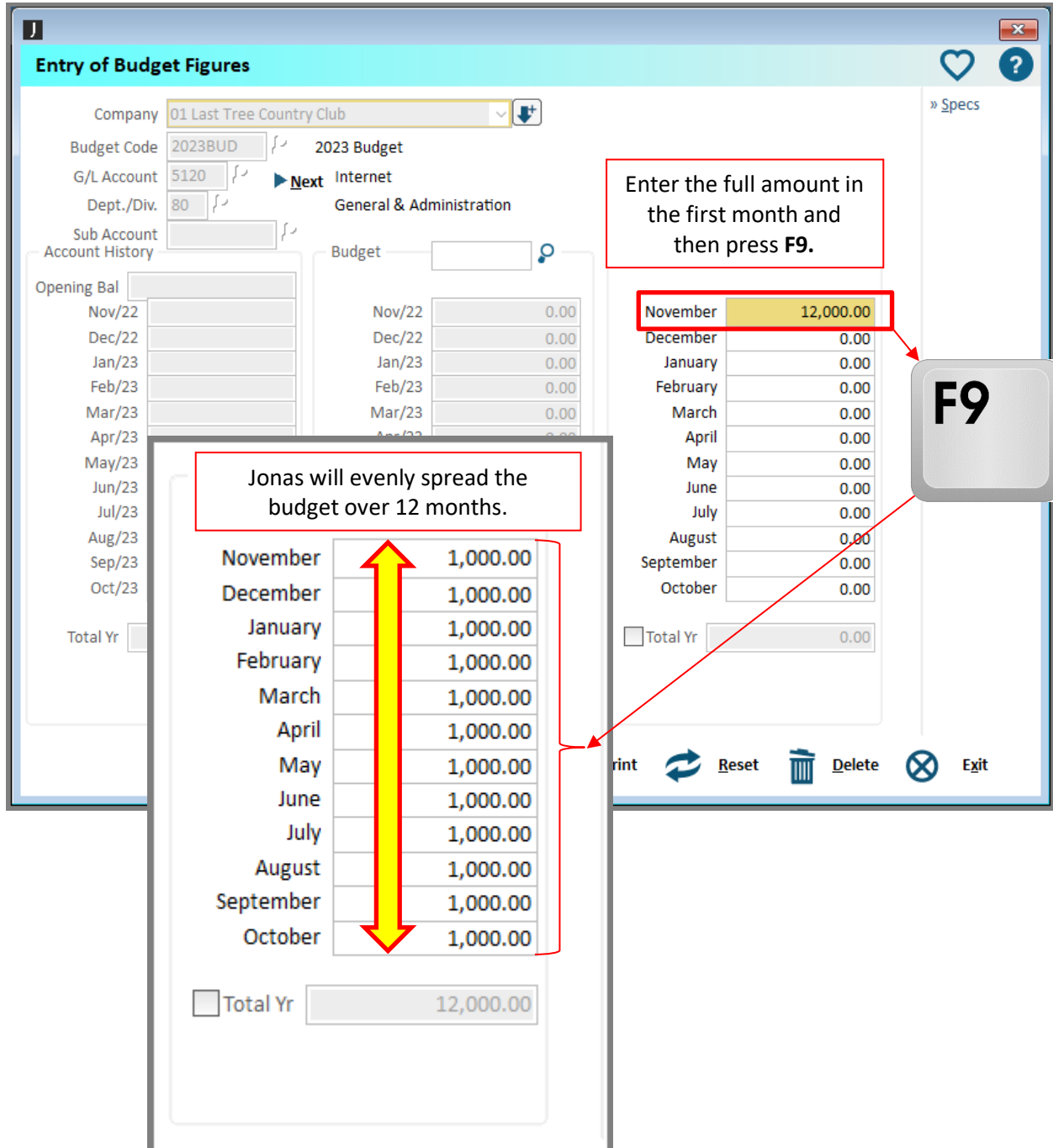
December 2023 Monthly Breeze Topics

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General Ledger - Evenly spread budget numbers over twelve months

Many clubs are in the process of uploading and manually entering budget numbers in Jonas. Remember to use this great feature if you manually enter numbers into Jonas and want to spread your budget evenly over 12 months.

General Ledger -> Budgeting -> Entry of Budget Figures



Enter the full amount in the first month and then press F9.

November	12,000.00
December	0.00
January	0.00
February	0.00
March	0.00
April	0.00
May	0.00
June	0.00
July	0.00
August	0.00
September	0.00
October	0.00
Total Yr	0.00

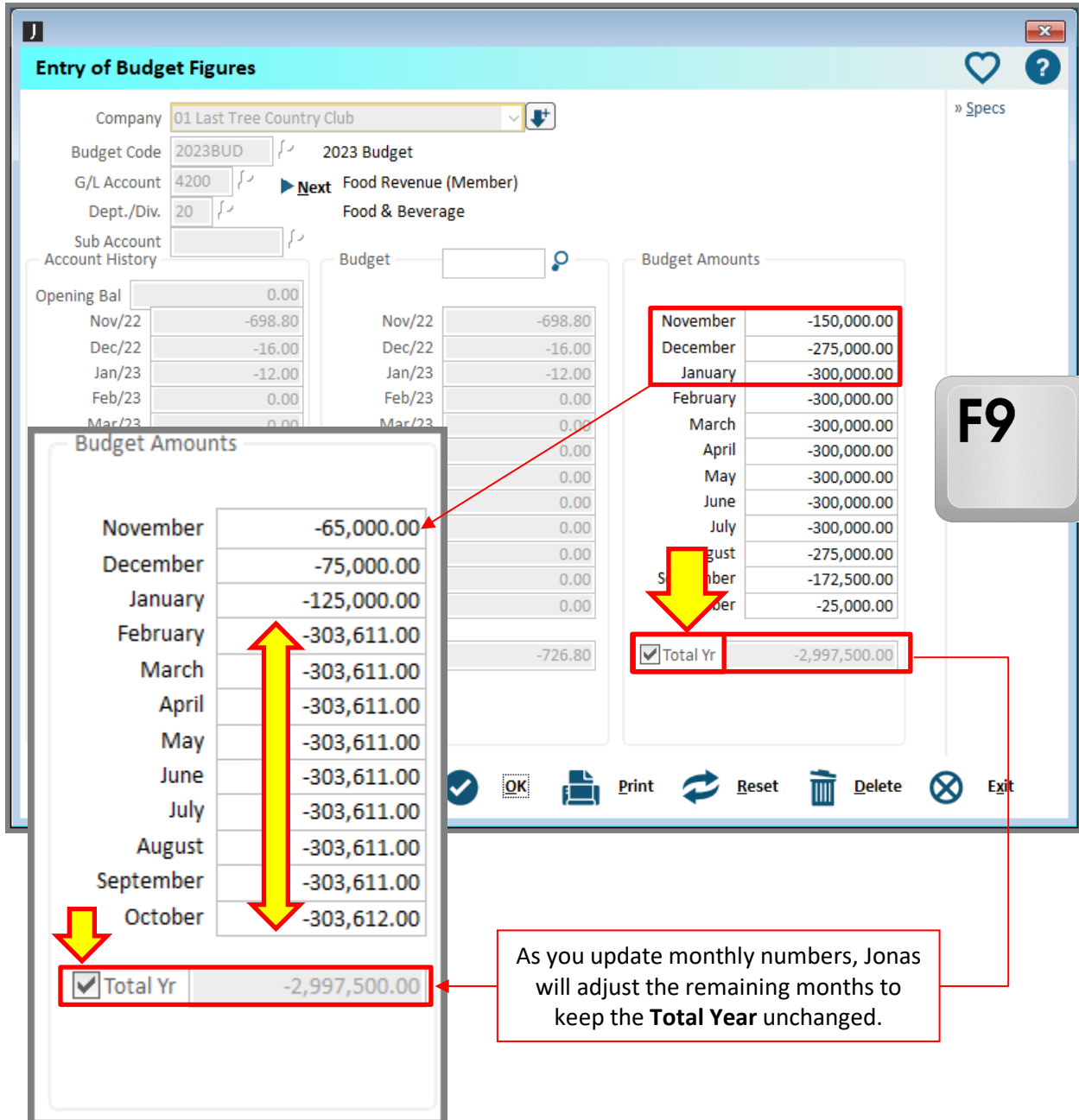
Jonas will evenly spread the budget over 12 months.

November	1,000.00
December	1,000.00
January	1,000.00
February	1,000.00
March	1,000.00
April	1,000.00
May	1,000.00
June	1,000.00
July	1,000.00
August	1,000.00
September	1,000.00
October	1,000.00
Total Yr	12,000.00

General Ledger - Adjust budget numbers without impacting the annual total

Last month, we reviewed steps to spread budget numbers evenly over 12 months. Did you know you can use the **Total Year** option below to "Lock In" the annual budget? As you make changes, Jonas will automatically adjust individual months, ensuring the **Annual Total** remains unchanged.

General Ledger -> Budgeting -> Entry of Budget Figures



Entry of Budget Figures

Company: 01 Last Tree Country Club
 Budget Code: 2023BUD (2023 Budget)
 G/L Account: 4200 (Food Revenue (Member))
 Dept./Div: 20 (Food & Beverage)

Month	Budget Amount
November	-150,000.00
December	-275,000.00
January	-300,000.00
February	-300,000.00
March	-300,000.00
April	-300,000.00
May	-300,000.00
June	-300,000.00
July	-300,000.00
August	-275,000.00
September	-172,500.00
October	-25,000.00
Total Yr	-2,997,500.00

Month	Budget Amount
November	-65,000.00
December	-75,000.00
January	-125,000.00
February	-303,611.00
March	-303,611.00
April	-303,611.00
May	-303,611.00
June	-303,611.00
July	-303,611.00
August	-303,611.00
September	-303,611.00
October	-303,612.00
Total Yr	-2,997,500.00

As you update monthly numbers, Jonas will adjust the remaining months to keep the **Total Year** unchanged.

Accounts Payable - Quickly De-activate old vendors

Most clubs have tons of old vendors in Jonas. You now have a quick way to de-activate old vendors based on the **Date Last Used**:

Accounts Payable -> Files -> Change Supplier Status to Inactive

Company: 01 Last Tree Country Club
 Subledger: A/P Accounts Payable Trade
 Show Suppliers not Used Since: 12312019

Select the INACTIVE field to change a supplier's status from Active to Inactive. Select anywhere in a row to launch a Supplier Inquiry.

SUPPLIER CODE	SUPPLIER NAME	DATE LAST USED	TOTAL PURCHASES	PURCHASE CATEGORY	INACTIVE
101	Zebra Technologies	Jun 30, 2015	0.00	PURCH	<input checked="" type="checkbox"/>
703	Dairy Supply of NY	Jun 30, 2015	0.00	PURCH	<input checked="" type="checkbox"/>
AMEX2	American Express	Sep 05, 2018	101.11	PURCH	<input checked="" type="checkbox"/>
AMEX3	Amex Credit Card Account	Jul 29, 2019	13,408.00	PURCH	<input checked="" type="checkbox"/>
BASIC	Basic Leasing	Aug 03, 2018	29,992.68	SERV	<input checked="" type="checkbox"/>
BEST	Best Insurance Company	Jan 07, 2019	12,000.00	INS	<input checked="" type="checkbox"/>
BLUECROSS	Blue Cross	Aug 03, 2018	15,016.36	PURCH	<input checked="" type="checkbox"/>
BOSTON	City of Boston	Jul 14, 2019	24,692.33	INS	<input checked="" type="checkbox"/>
CCBM	Construction Company of FL	Sep 11, 2018	79,514.43	GOLF	<input checked="" type="checkbox"/>
CITI	Citi Bank Credit Card	Apr 15, 2018	24,201.00	PURCH	<input checked="" type="checkbox"/>
CLEANALL	Clean All Cleaning Service, Inc	00,	0.00	PURCH	<input checked="" type="checkbox"/>
Totals		Suppliers: 79	Purchases: 812,656.58	Inactive: 79	

Tip: Right-click to Select/Deselect all vendors:

- Select All This Column
- Deselect All This Column
- Print

When searching for vendors, use the recycle wheel to toggle between: Active, Inactive or Both:

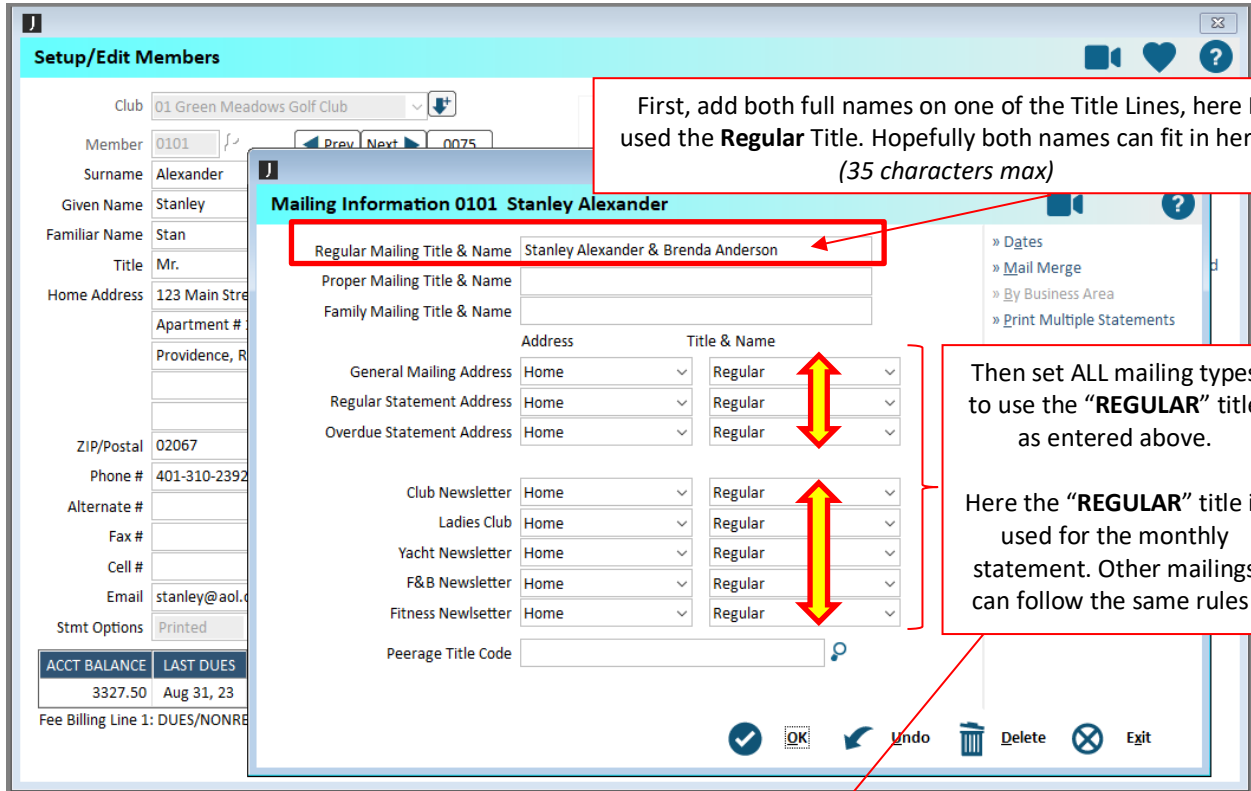
Suppliers (by Name) (Active) (Press Gear or F10 - by Number)

Supplier Name	Supplier Code	Address 1	Address 3
** Add a new Supplier **			
A1 Golf Course Supplies	A1COURSE	107 Main Street	West Palm Beach, FL
Alan's Golf Supply	ALAN	101 Golf Cart Lane	
Alpine Menu Design	1234567890	1234 Dinner Way	
American Express	AMEX2	PO BOX 10015	
Amex Credit Card Account	AMEX3	PO BOX 98766	
BBQ Masters, Inc.	BBQMST	111 Char Grilled Ave	
Basic Leasing	BASIC	2564 Baymeadows Circle West	Florida
Best Insurance Company	BEST	123 Main Street	Atlanta, GA
Birchwood Golf Supplies	BIRGLF	400 Birchwood Drive	
Blue Cross	BLUECROSS		
Blue Ridge Insurance	INSUR		
Brook Allen Printing	BROOK	193 Paper Jam Way	Port Jefferson, NY
Callaway Golf	CALLAWAY		
Cantor Golf Supply	CANT	129 Old Drive Lane	Miami, FL 33155
Cater Events International	-203		
Citi Bank Credit Card	CITI	1 Big Money Tower	
City of Boston	BOSTON	1 City Plaza Way	
City of Palm Beach	PALMBEACH	1 Tree Street	
Clean All Cleaning Service, Inc	CLEANALL	107 Wet Mop Lane	Nashua, NH
Club China and Serveware	CLCH	567 Bordon Rd	GA
Cobra Golf Inc.	COBRA	189 Snake Lane	Atlanta, GA

Club Management - Tip for handling spouses with different last names

Do you have any members at the club with two different last names? This is quite common, and many clubs struggle to get statements and other mailings to show both names. The best option is to use the "Mailings" Tab on the member's profile:

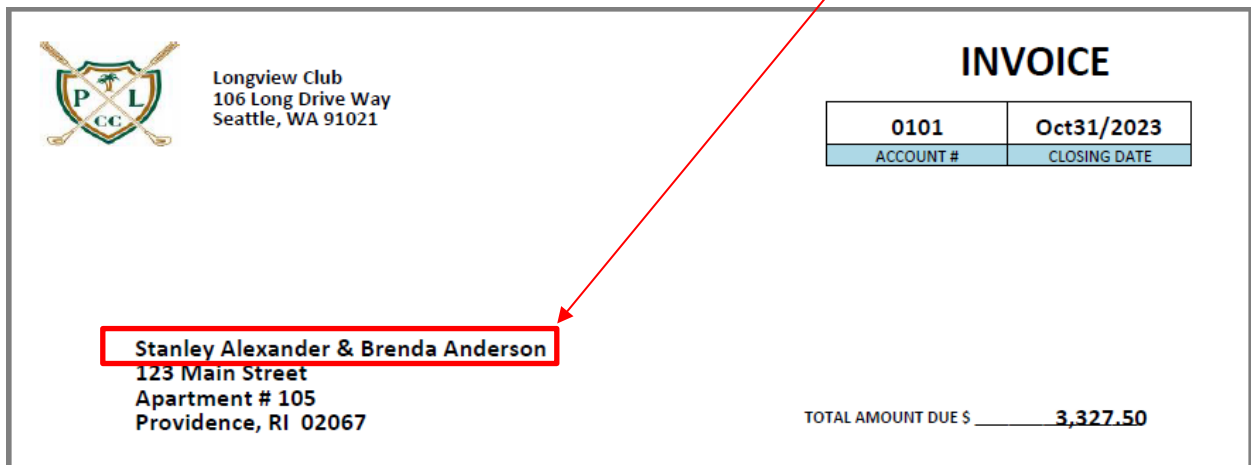
Club Management -> Member File -> Setup/Edit Members -> Mailings Tab



First, add both full names on one of the Title Lines, here I used the **Regular** Title. Hopefully both names can fit in here. (35 characters max)

Then set ALL mailing types to use the "REGULAR" title as entered above.

Here the "REGULAR" title is used for the monthly statement. Other mailings can follow the same rules!



INVOICE

0101	Oct31/2023
ACCOUNT #	CLOSING DATE

Stanley Alexander & Brenda Anderson
123 Main Street
Apartment # 105
Providence, RI 02067

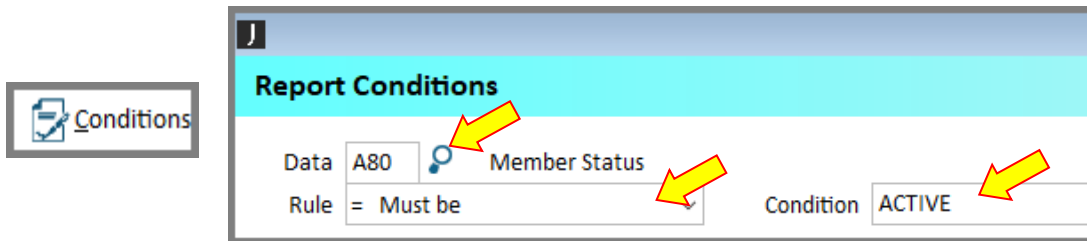
TOTAL AMOUNT DUE \$ 3,327.50

Membership Report Writer - Free Condition when writing reports

Maximizing your conditions to write effective reports in Jonas is very important. Here is a trick to get a "free" condition in Jonas.

Typically, you only think about adding conditions in the conditions screen below. Did you know you can use the **Calc Field** on some basic membership fields as a free condition?

Instead of using this popular condition:



You can use the calculation line below to create some common conditions, saving space when you get to the conditions fields. These are just as effective and will produce the same results.

	1	2	3	4
Data	A01	A11	A80	B03
Format	NA	NA	NA	NA
# Chars	10	25	10	10
Hdg 1		Member		
Hdg 2	Member #	Name	Status	Category#1
Calc			=ACTIVE	

Here are a few others that you may find helpful and may vary depending on your setup:

A80
NA
10
Status
=SUSPEND

This will give you all suspended members (Based on Membership Status)

A86
NA
06
Member
Count?
=Y

This powerful condition will give you all members that make up the member count report.

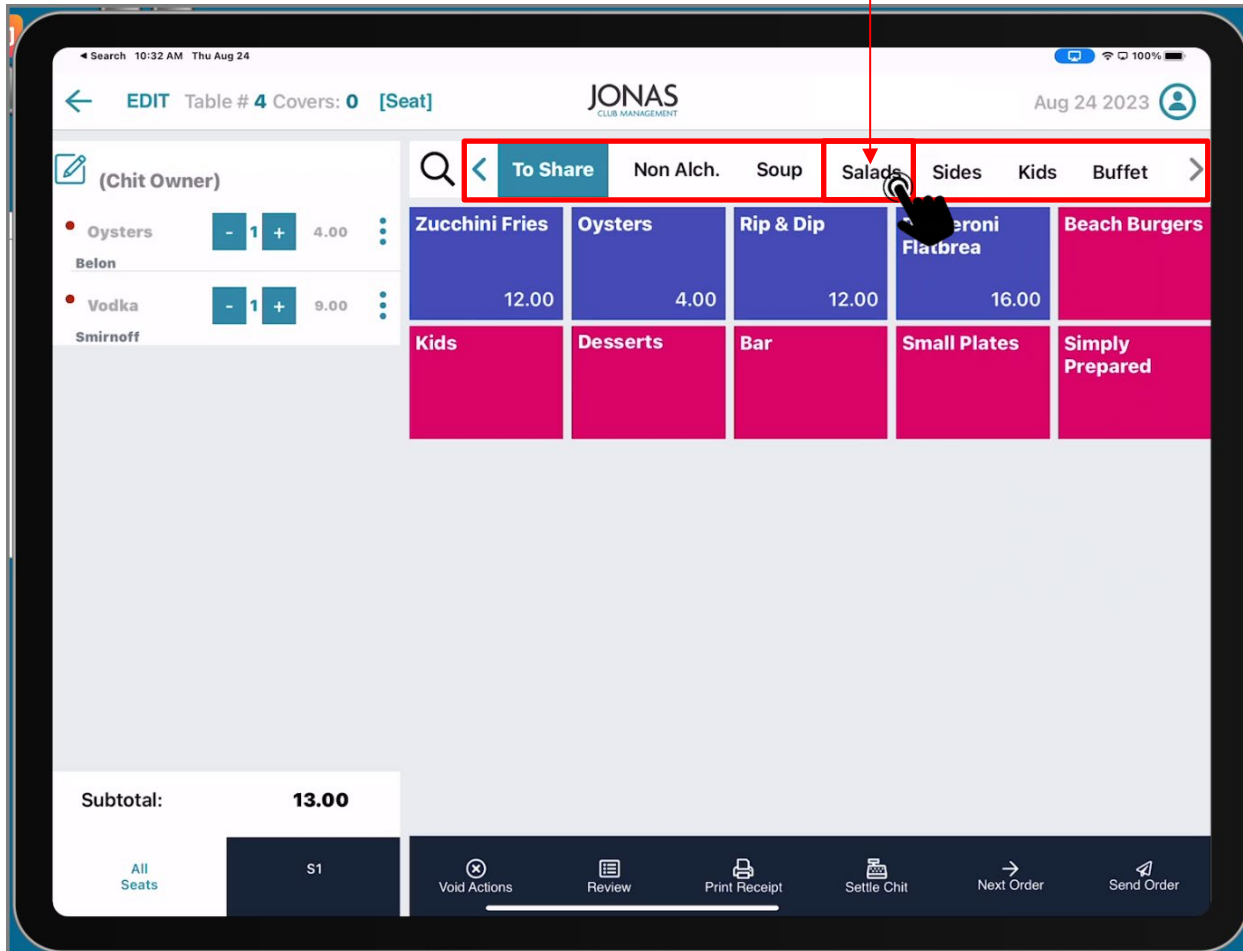
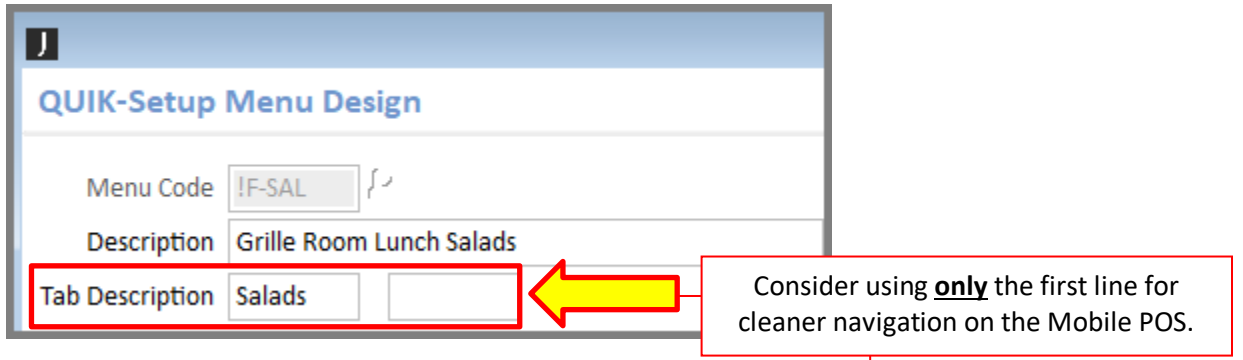
B03
NA
10
Category#1
=SENIOR

This will give you all senior members, assuming category #1 refers to your dues category.

Mobile Point of Sale - Tab description suggestion

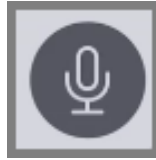
As more clubs adopt Jonas's Mobile Point of Sale App, we will start covering this great program in The Monthly Breeze. We will start with the importance of menu tab names for mobile POS as these become an essential way to navigate between menu pages. We suggest streamlining your navigation by only using one line of the menu **Tab Descriptions**, as seen below:

Point of Sale -> System Setup -> Quick Setup Menu Design

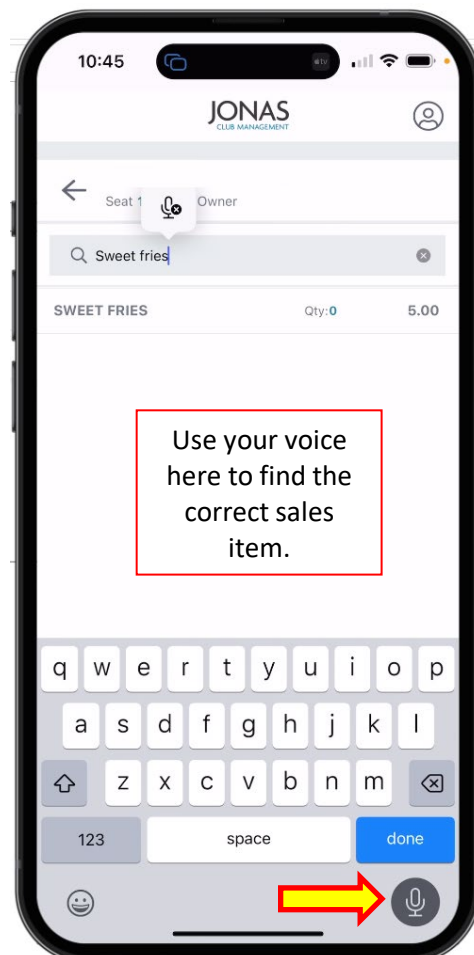


Mobile Point of Sale - Use Voice recognition to find Members and Sales Items

More and more clubs are using the Jonas mobile Point of Sale. One of the best options is using voice recognition natively through the device. Any data entry point in the Mobile Point of Sale will have the microphone option to understand speech:



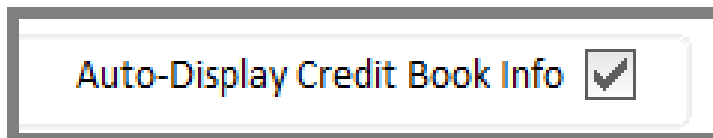
Tip: Try spelling or speaking the member's name or sales items you are seeking for faster access in the mobile Point of Sale. Sometimes, we find that spelling works better than speaking.



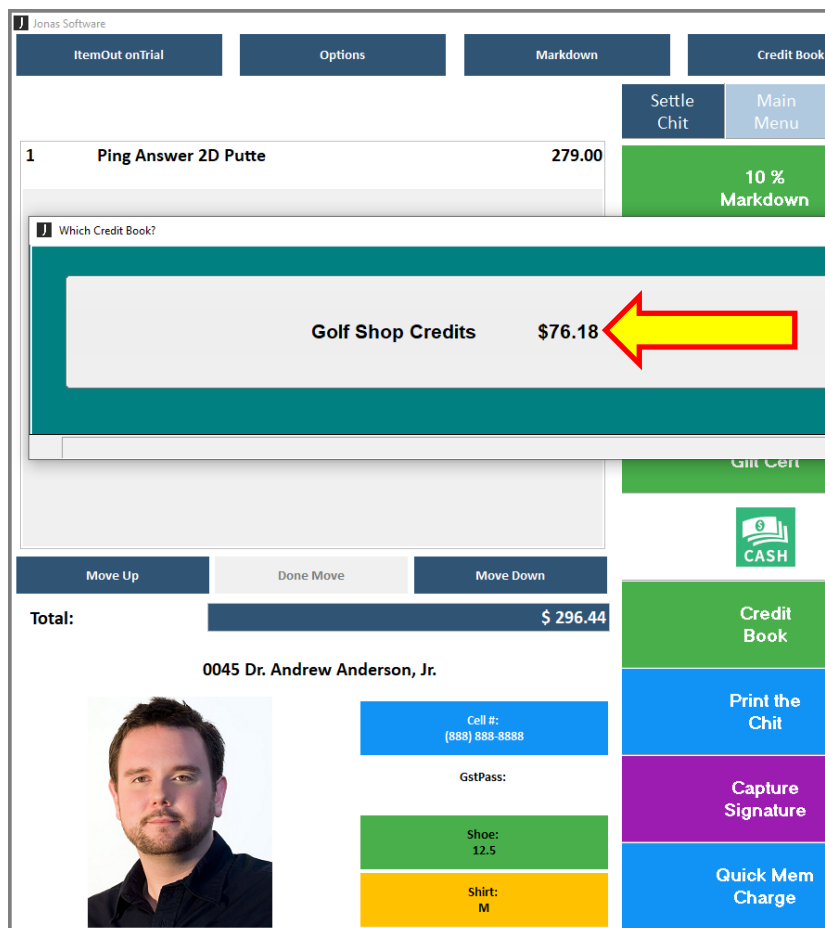
Golf Shop Point of Sale - Automatically display credit book balances at POS

Many clubs want to encourage members to use their credit books. Jonas can automatically display credit book balances when closing a POS chit. This is set up here:

Point of Sale -> System Setup -> System Parameters -> Other Modules



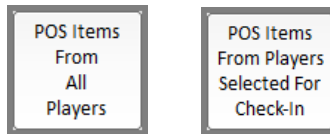
Assuming your club has a settlement screen, Jonas will automatically display credit book balances when you are navigating to your settlement screen. This will remind staff and encourage members to redeem their credit books.



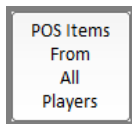
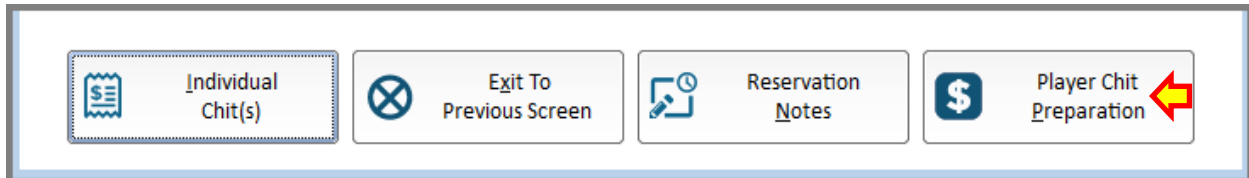
Tee Time Management - New Player Chit Preparation Buttons

Jonas made a significant update to the Player Chit Preparation screen this season. The Tee Time Player Chit Preparation screen has a new button allowing you to control which player's POS Items will be transferred to the main player. *Note: you must be on version **2023.0208** to access this new feature.*

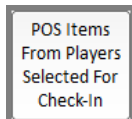
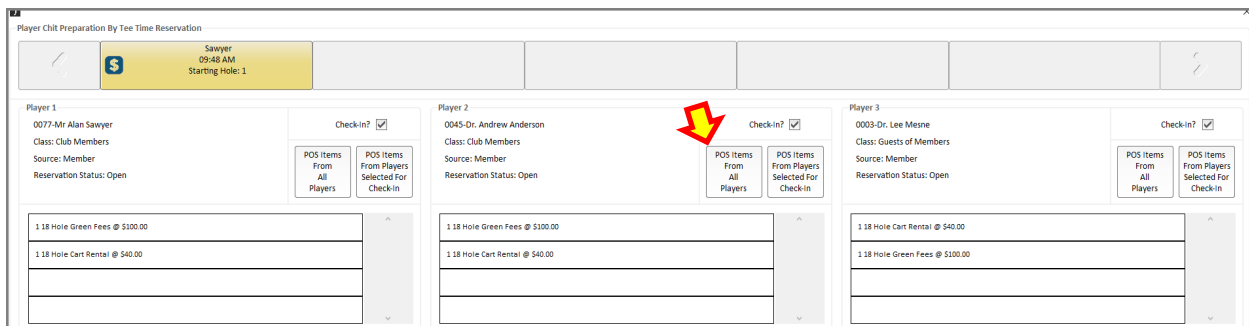
Previously, the "**All POS Items**" button would move *all* POS Items associated with each player on the reservation to the main player **regardless of check-in status**; this button has been renamed "POS Items from All Players."



When checking in a Tee Time, use the "Player Chit Preparation."



This is the way Jonas has always worked. All items will be transferred to one chit regardless of check in status.



This new button will **ONLY** transfer items for members/guest who are checking in at the same time. All other sales items remain unchanged.

